ACA Salesforce Opportunities Portlet for Liferay

Administrator configuration

From | ACA IT-Solutions
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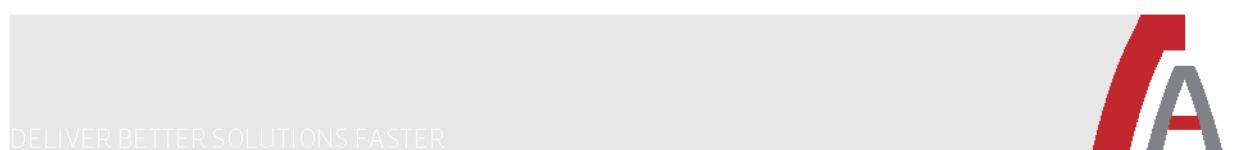
Salesforce Configuration

Before you can start using the Salesforce Opportunities Portlet, a few configuration steps need to be taken in Salesforce. The usage of the Salesforce Opportunities Porltlet needs to be defined as a Connected App in Salesforce. How this is achieved is neatly described by Salesforce on the page: https://help.salesforce.com/apex/HTViewHelpDoc?id=connected_app_overview.htm.

Eventually you should become a **Consumer Key,** a **Consumer Secret** and a **Callback URL** which you will need in the following section in this manual.

Initial Portlet Configuration

Once the Salesforce Opportunities portlet is deployed, an entry **Salesforce Configuration** in the **Control Panel** becomes available under the **Portal** section. Before the users of your Portal can actually start using the Salesforce Opportunities portlet, certain properties need to be configured in this Control Panel portlet.
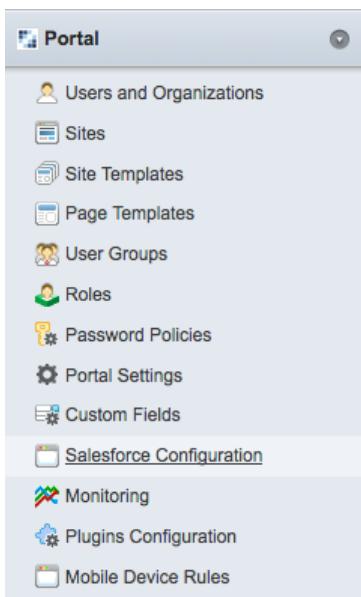
Salesforce Remote Access page parameters

Upon entering the Salesforce Configuration portlet, you will be presented with a small form that requires you to provide some global configuration concerning the remote access to Salesforce as described below.

Salesforce Configuration

Consumer Key *

Consumer Secret *

Redirect URI *

**Connect to production. Disable checkbox to connect to sandbox.**

☐

Currency

[Save]

Field	Description	Example
Consumer Key	This is needed as a parameter at several stages of the OAuth2 authentication process. It can be found as a Salesforce administrator at salesforce.com. You can find it at the following location: **user name > setup > Develop > Remote Access > Application Name > Consumer Key** Salesforce Help about Remote Access	3MVG9Gmy2zmPB01p45NOc82kqJc fUfZL7gG9HJucswK0MR0WhGDKk6 PtxNmOAffpzB9R3tz8YEEKZOh0aZ_ v_
Consumer Secret	At the same location as the consumer key the consumer secret can be found	3914023905717280354
Redirect Uri Servlet	Url needed for Salesforce to return to the servlet of your application, your Liferay host needs to be in the url and this is the call back url found next to the consumer key and consumer secret	http://localhost:8080/delegate/OAuth Code
Salesforce Production Data	Flag to indicate that data will be retrieve from a Salesforce Production Environment Data or Salesforce Test Environment	
Currency	Currency label that will be prepended to all monetary values in columns *Amount* and *Expected Revenue*. Can take any text up to three characters.	EUR

Click on the **Save** button to store the provided data so end users of your Portal can start using the Salesforce Opportunities portlet on their pages.
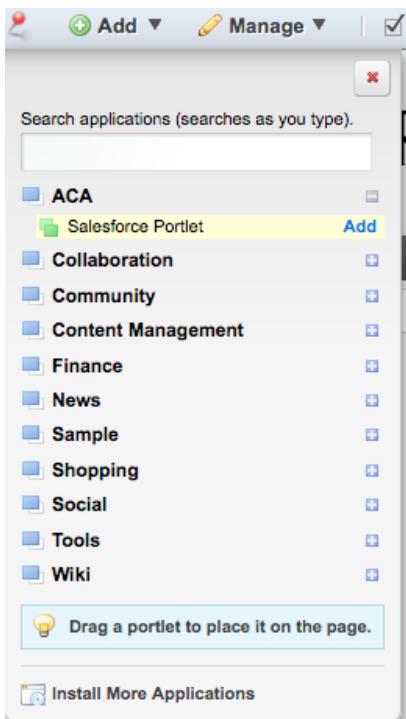
Congratulations, you have now successfully configured the Salesforce Opportunities Portlet and your end users can start using it! They can find it in the category named **ACA**.

Contact

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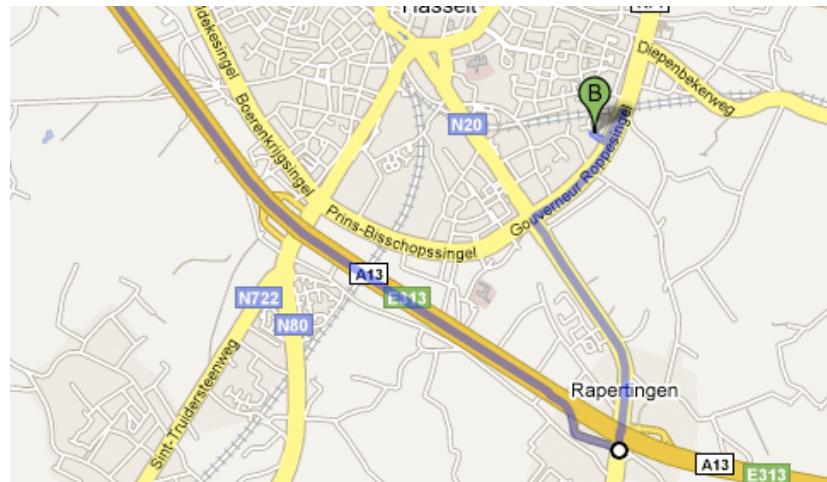
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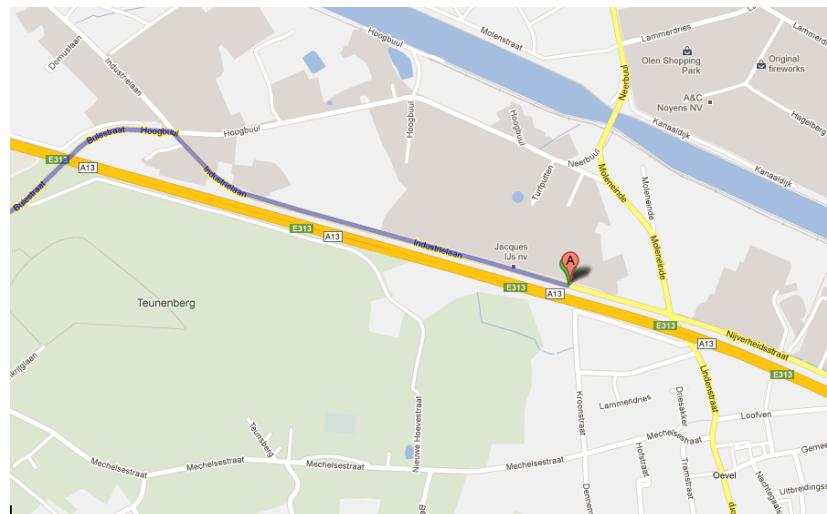
ACA Salesforce Opportunities Portlet for Liferay

User manual

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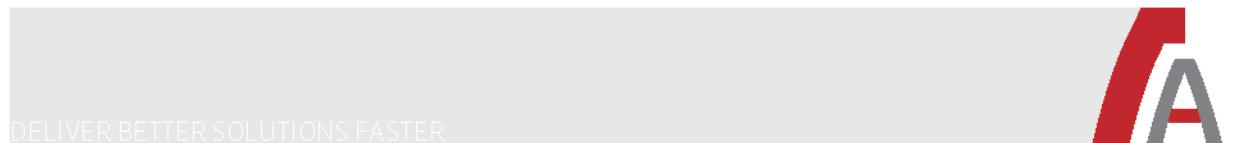
Initial Configuration

Your Salesforce and Liferay administrator need(s) to configure the Salesforce portlet first via the Control Panel.

[Liferay administrator configuration](#)

Portlet Usage

Adding the portlet to the page

Add the Salesforce Opportunities portlet to a page by using the **dockbar** of Liferay. The portlet is under the **ACA** category. The page can be a site page or a personal page. The preferences for the portlet are stored on a per-user basis, so a user can never access the configuration configured by another user. *To go to the preferences page, click on the wrench icon.*

Authorization

The first time you want to use this portlet, you'll need to provide your authorization details so Liferay can retrieve your Salesforce data. For this a redirect to Salesforce must occur.

When you have added the Salesforce Opportunities portlet to the page, a message appears telling you to authorize by going to the preferences section.
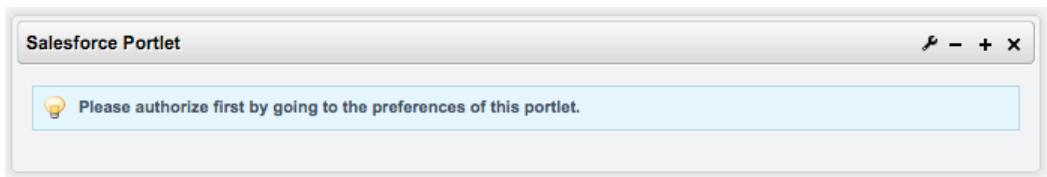
In the preferences section the status of the portlet is shown together with a button **Authorize** (or Revoke in case an authorization has taken place already).
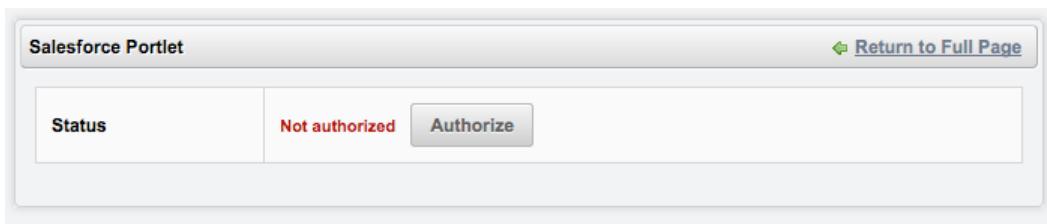
The action behind the **Authorize** button will redirect you to the log in page of Salesforce. Please provide your Salesforce username/password combination and click on the log in button. You will be redirected again, this time back to the Portal where the preferences section is expanded with new options.

Configuration of the Salesforce Opportunities portlet

In the preferences section of the Salesforce Opportunities portlet, an authenticated user can define a fixed filter according to his or her wishes. The visible columns and pagination details can be configured as well.

Here is a short description of each of the possibilities:

- **Status:** status information showing whether or not you are authorized or not. An accompanying button to **Authorize** or **Revoke** will be shown respectively.

- **Visible columns**: allows you to select the columns you would like to see in the front end. Initially no columns are selected so no information will be visible in the full page.

- **Filter on Values**: provide you the possibility to create a filter for the Salesforce results, based on *owner*, *type*, *stage* and *expertise area.*

- **Results per Page**: select an amount for the number of results to show per page from a predesigned list of amounts.

- **Save**: save your personal preferences for this instance of the Salesforce Opportunities Portlet.

By saving your personal preferences and returning to the full page again, you will see the (paginated) set of resulting opportunities for the filter you have applied.

Front view of the portlet

In the full page view of the Salesforce Opportunities portlet, a table with the resulting opportunities is shown.
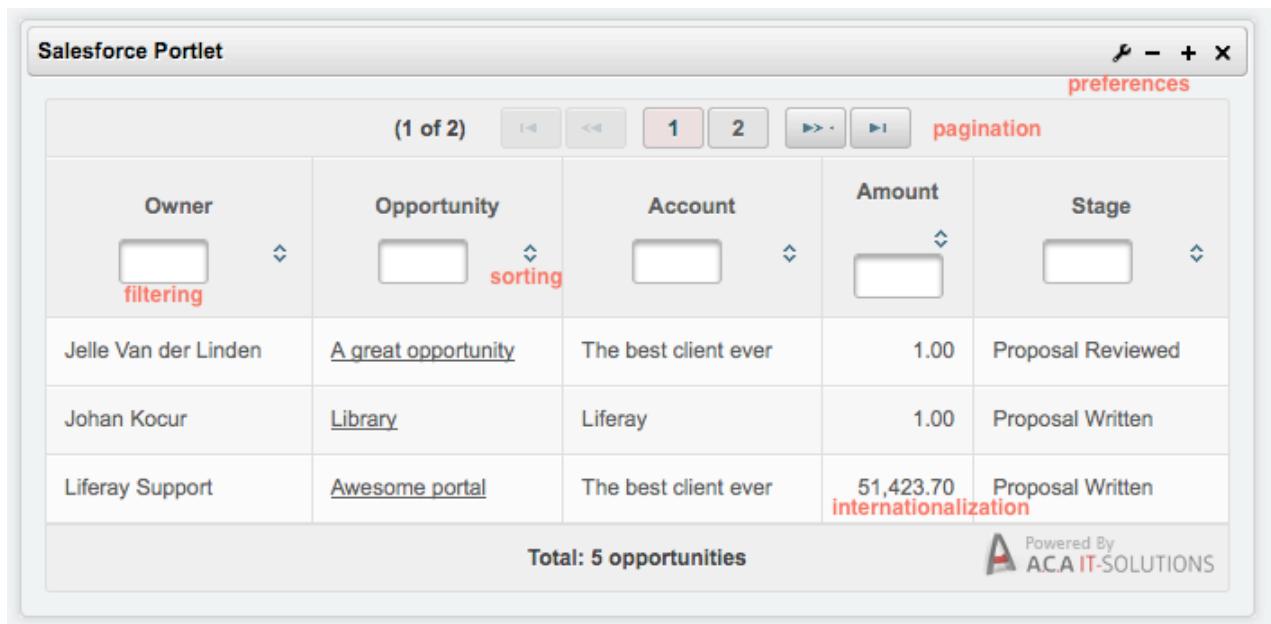
Salesforce Portlet

preferences

(1 of 2) | 1 | 2 | *pagination*

Owner	Opportunity	Account	Amount	Stage
filtering	*sorting*			
Jelle Van der Linden	A great opportunity	The best client ever	1.00	Proposal Reviewed
Johan Kocur	Library	Liferay	1.00	Proposal Written
Liferay Support	Awesome portal	The best client ever	51,423.70 *internationalization*	Proposal Written

Total: 5 opportunities

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This view has the following features:

- Use the pagination at the top to go to a different page in the list

- Click on an opportunity name to open it in Salesforce

- The total amount of opportunities found is visible in the table footer

- Sorting of each column is provided by the arrows. Click on them to change the sorting order.

- Each column supports filtering. For each columns this is a *contains* expression except the amount where it is from left to right.

- The figures in the Amounts column support internationalization for the number format

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